

Electronic Reserves: A Centralized Approach to the Scanning Process

Cherié L. Weible

ABSTRACT. Electronic reserves are being offered at colleges and Universities across the country creating an opportunity for collaboration between the library units of academic libraries. Library units with course reserves in medium and large academic libraries can capitalize on the benefits working with a centralized scanning unit, thus consolidating the scanning process of electronic reserves processing. The cooperation between library units to provide better service results in a positive relationship between course instructors, students, and the library. *[Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress.com> Website: <<http://www.HaworthPress.com>> © 2003 by The Haworth Press, Inc. All rights reserved.]*

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INTRODUCTION

Libraries have been in the business of placing course materials on reserve for instructors so their students can access supplementary and special readings for a long time. Now with the use of new technologies, electronic reserves has become another essential service offered to students and instructors by academic libraries.¹ Students want the availability of assigned readings 24/7 to fit into their schedules and research needs, while instructors benefit from their assignments being readily available to students in an easily accessible electronic format.² During this time of budget cutbacks and limited funding for new services, it is critical for academic libraries to look for viable options to maintain service and find ways to cooperate across units by crossing the traditional boundaries of rigid job descriptions and unit functions.

COLLABORATING BETWEEN LIBRARY UNITS

What do the Interlibrary Loan, Document Delivery or Access Services departments have to do with e-reserves? They can be very involved if they expand their electronic document delivery processing expertise to include scanning the e-reserves for the campus library and affiliated units. In the case of centralized libraries, having Access Services units responsible for e-reserves processing minimizes the additional training and costs involved with successful processing of the material because they have already invested in the purchase of equipment, software, and training of staff. Decentralized academic libraries can capitalize on using a centralized Access Services unit to process the e-reserves of smaller departmental libraries and units located across the campus. For medium and large academic libraries, centralization of e-reserves processing can simplify and expedite the entire process. The expertise and personnel of a single unit is used to achieve the goals of providing quality e-reserves access to those students using specialized departmental libraries.³

BENEFITS OF COLLABORATION

In the model employed by the University of Illinois at Urbana-Champaign, there are many benefits for departmental libraries "outsourcing" e-reserves scanning to a unit that was previously known only for traditional Interlibrary Loan and Document Delivery services.⁴ University and college libraries should consider collaborating with any Access Services department that uses scanning

in their daily work or other departments that focus on the scanning of digital projects. The benefits from this collaboration include:

- **Cost Effectiveness:** individual departmental libraries do not need special equipment or software purchases.
- **Time Management:** additional training on the function of new equipment or software for the staff of the departmental library is not needed.
- **Cross Training:** units where the focus is on production and staff are familiar with the needs of processing large amounts of material in a short timeframe can build on previous skills to incorporate additional functions.

These benefits offer substantial reasons for departmental libraries and small units to work with the library unit already providing electronic document delivery or other electronically scanned resources to library users. Access service departments have already invested in the special equipment and software needed to scan the e-reserves items such as scanners and Adobe Acrobat. Staff in these units have usually researched the market and selected scanners with the functions comparable to the needs of e-reserve processing and are also aware of the various software products available and the options for scanning materials in various formats for users in the ways that are the quickest for processing and the most acceptable for quality. Scanning e-reserve material is similar to scanning documents for electronic delivery because both are textual based, standard sized, black and white, and do not require photographic or archival quality images.

Training for staff and students in the function of scanning equipment and software can be costly and time consuming, especially when a unit's e-reserve collection consists of fifty items or less a semester. Comparatively, staff and students employed by departments using scanners and a variety of software daily, have a smaller learning curve as training for e-reserves processing builds on skills learned previously to perform routine tasks.

Another important point to consider when "outsourcing" e-reserves processing to Interlibrary Loan or the equivalent department is production and turnaround. ILL has always been a unit based in production type processing using batch processes to expedite turnaround time for requests. These departments have created workflows that move requests and materials rapidly through the library system to fill user demands. Turnaround time for Document Delivery processes is studied with the focus on the impact of implementing the newest technologies available. While this primarily relates to Interlibrary Loan requests, the same practices can be easily transferred to e-reserve scanning projects.⁵ Peak times for scanning done in units primarily responsible for Document Delivery is around the months of October, November,

February, and March for campuses on a semester system. E-reserves scanning are primarily processed just before the semester begins, so although scanning is a daily task for these units, peak times for the two processes do not occur at the same time.

COMMUNICATION

Communication between the library holding the e-reserves and the unit processing the material becomes essential once the decision is made to proceed with the outsourcing of the scanning of the material. Incoming materials will consist of items traditionally placed on reserve including: books, photocopies of journal articles, a chapter from a book, past exams, answer sheets, lecture notes, and syllabi.⁶ In successful trials of e-reserves, instructors for library reserves are submitting additional formats such as Microsoft PowerPoint slide shows.⁷ Incorporating additional formats into e-reserves programs will change processing, but it is encouraging to see faculty embracing new services provided by libraries and pushing for every potential allowed by current technology. Once the material is delivered to the scanning unit, a log sheet or other agreed upon tracking record should be kept for items in transit between the smaller library unit and the unit scanning the materials on their behalf (see Table 1).

The library units may prefer to hand deliver boxes, folders, or envelopes of material directly to the processing area and deposit them in a designated receiving area.

Once the material has been scanned and returned to the unit housing the material the final steps of processing can be finished by the unit placing the material on reserve. The file for the scanned piece can be named in a previously agreed upon convention and saved in the correct format on a file server that allows the owning unit to "pick up" their material from the server to complete

TABLE 1. Sample Log Sheet for Tracking E-Reserves Material

Date Received	Library Unit	Date Scanned	Page/Quality Check	By Whom	Saved As	Comments
6-6-02	EDX	6-6-02	23/23	LW	Krueger_Sports	Good
6-6-02	AGX	6-7-02	11/11	CW	Stigberg_Floral	Faint Text
7-6-02	HIX					

processing using the library's chosen system to complete efficient linking of the material to the OPAC.⁸ In today's networked world, a unit can still have control of its e-reserves and access to the scanned document instantly upon its completion.

GUIDELINES

When starting a new service for scanning documents for other library units, it is important to think about starting small and working up. By offering scanning services to two or three smaller units, the initial semester the service is started allows room for trial and error in the Access Services area without being swamped by the entire load of campus course reserves.⁹ Once the initial semester is completed, workflows can be re-arranged and additional units can be offered the scanning service.¹⁰

Another important consideration is creating a document outlining which parts of the process will be completed by the unit placing the material on reserve and which by the unit scanning the material. This written communication of expectations and guidelines prevents processing breakdowns in midstream of the entire process.¹¹ An example is establishing who is responsible for obtaining a clean, best copy possible for the e-reserve. Is it the responsibility of the instructor, the departmental library, or the unit scanning the material? Written guidelines also include established turnaround time expectations keeping communication between the instructors, unit library and scanning unit open and understood (see Appendix 1 for an example of guidelines established between a departmental library and scanning unit).

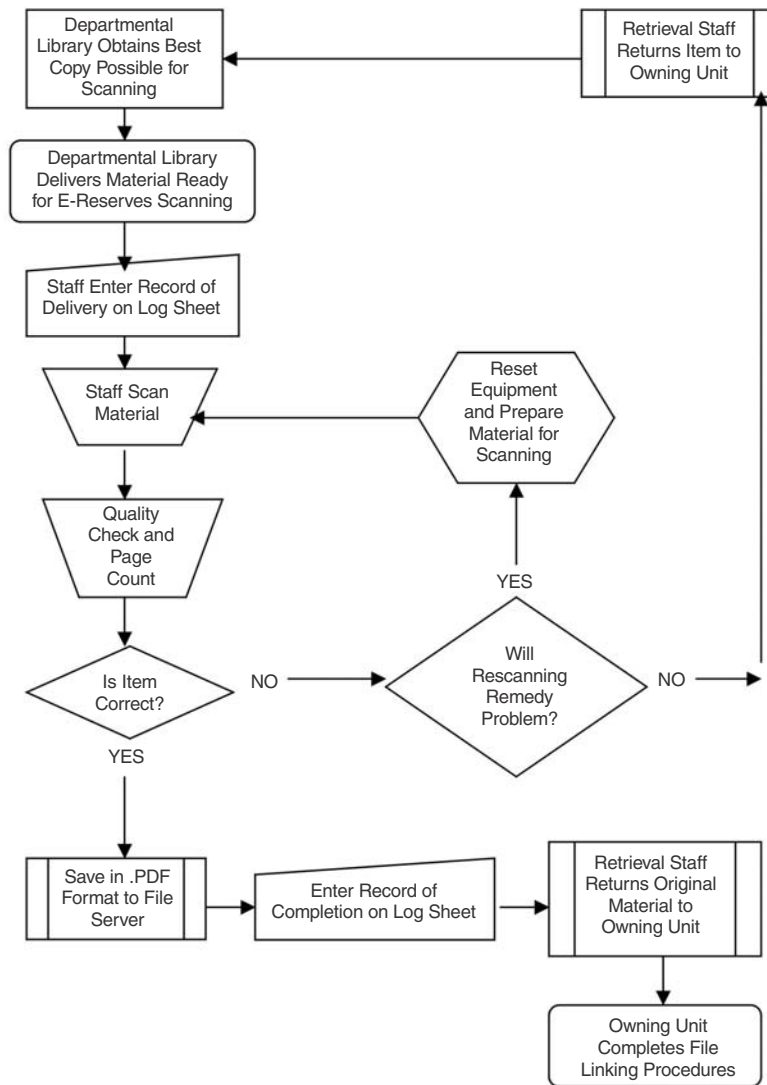
FLOWCHARTING

The creation of a flowchart to follow the e-reserves scanning process is instrumental in working out any problems encountered during the trial period (see Figure 1).¹² Flowcharting a process reveals problems so the workflow can be adjusted accordingly. It is also useful in determining workload when staff member names are placed next to each piece of the process. Flowcharting can seem like a large amount of work, however it is beneficial as it often shows error in workflow design.

CONCLUSION

Collaboration among library units results in efficiency of costs and consistency in processing electronic course reserves. Providing electronic reserves in ways that streamline the workflow and consolidate the scanning process con-

FIGURE 1. Flowchart of an E-Reserves Scanning Process



tinue to improve the library service and user perceptions of that service. Working with established scanning practices in departments known for scanning materials results in an optimal workflow for all units involved. Time, training, and looking within the library system to process the scanning piece of the electronic reserves saves money. The final completed effort from cooperation between units centralizing electronic reserves scanning results in an effective method to fulfill user expectations of library services.

NOTES

1. Examples include Bud Hiller and Tammy Bunn Hiller, "Electronic Reserves and Success: Where Do You Stop?" *Journal of Interlibrary Loan, Document Delivery & Information Supply* 10, 2 (1999): 61-75; Victoria S. Heenan, "Electronic Reserves: An Opportunity for Collaboration," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 11,1 (2000): 29-37; Leah G. McGinnis, "Electronic Reserves at the University of North Carolina: Milestones and Challenges in Implementing a New Service," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 9, 4 (1999): 73-85.

2. Scott Peterson, "Implementing Cost Effective Electronic Course Reserves in an Academic Library," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 10, 2 (1999): 45-59. See also Ginny Sylvester, "University Libraries—Electronic Reserve," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 11, 2 (2000): 113-119.

3. Victoria S. Heenan, "Electronic Reserves: An Opportunity for Collaboration," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 11,1 (2000): 29-37.

4. The Information Resource Retrieval Center (IRRC) at the University of Illinois at Urbana-Champaign first offered to scan e-reserves for two departmental libraries in the Summer of 2001. The Education and Social Sciences Library and the History Library participated in this trial service submitting their course reserves for the Fall 2001 semester to the IRRC for the scanning process.

5. Mary Sellen, "Turnaround Time and Journal Article Delivery: A Study of Four Delivery Systems," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 9, 4 (1999): 65-72.

6. Ginny Sylvester, "University Libraries—Electronic Reserve," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 11, 2 (2000): 113-119.

7. Mary S. Laskowski and David Ward, "Creation and Management of a Home-Grown Electronic Reserves System at an Academic Library: Results of a Pilot Project," *The Journal of Academic Librarianship* 27, 5 (2001): 361-371.

8. *Ibid.*

9. Victoria S. Heenan, "Electronic Reserves: An Opportunity for Collaboration," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 11,1 (2000): 29-37.

10. In the model at the University of Illinois at Urbana-Champaign, two additional departmental libraries were offered scanning services for the Spring 2002 semester.

The IRRC contacted the Agriculture Library and the Natural History Library to participate in the expanded trial service.

11. At the University of Illinois at Urbana-Champaign, the Agriculture Library and the Natural History Library are housed outside the Main Library where the IRRC and the first participants of the trial service are located, so a brief meeting was held in December 2001 to establish guidelines for service expectations from the IRRC and the departmental libraries participating in the trial.

12. Cynthia A. Watkins, "Using Flowcharts to Streamline Document Delivery Services in an Academic Library," *Journal of Interlibrary Loan, Document Delivery & Information Supply* 10, 2 (1999): 77-88.

APPENDIX

Guidelines for Materials Scanned by the IRRC†

Article copies or book chapter copies are delivered to the IRRC 128 Office by units. Please make every effort to identify needed reserves before the start of classes. The IRRC peak times are right after classes begin. No more than 10 articles per unit can be guaranteed for daily processing after classes begin. All units will have their own basket for hand delivered materials.

All delivered items should be:

- In a folder or easily identified as one piece.
- Identified with unit name.
- Each copy should be the cleanest possible; Text should not be marked; Material should be a first generation copy.
- Single sided 8 1/2 by 11 copies are preferred.
- The documents are identified by the author's last name and the first significant keyword of the title. Please use a Post-it note for anything that is an exception to that rule.

IRRC staff will complete the log sheet for each request as it is finished. Students scanning materials are required to review their work and note any problems on the log sheet. Every effort will be made to digitize material within 24 business hours of receipt and always within 48 business hours unless the copy is too poor a quality for processing. Units can plan to link materials 24-48 hours after delivery or wait to receive the material back via delivery by IRRC retrieval staff during their regular trips to departmental libraries.

†Document notes provided by Lynn N. Wiley, Head of IRRC at the UIUC.